



2021 10 27

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2021Q3

+IDM

688396

:

	2021	2021	69.28	(
+41.70%)		16.84	(+145.20%)
	24.73		+35.43%	+2.60%
6.16	(+117.26%		-7.73%)

300			
	1M	3M	12M
	-10.7%	-32.0%	23.7%
300	0.4%	3.1%	4.2%
			2021/10/27
			62.14
52			46.11-104.47
			82,030.51
			26,925.09
			132,009.19
			43,329.72
			2,952.81
	%		0.00
2021H1			
*	*		2021-08-20
2020			IDM
*	*		2021-01-20

■ 2021Q3

IDM

				2021Q3
	37.86%	+8.35pct		+1.59pct
24.60%	+7.57pct	-2.78pct		2021Q3
		6.02%	+0.55pct	+3.48pct
	1.53%	-0.09pct		+0.09pct
6.35%	+0.36pct	+2.35pct		-1.86%
+0.29pct		+1.04pct		

■

12

2021Q3	2.20	+52.60%
MOSFET	1	MOSFET
		300
2 IGBT	IGBT	IGBT
		3
		650V SiC JBS

IDM
 MOSFET IGBT / 5G
 1.78/2.08/2.33 / 23.49/27.46/30.80 PE
 2021-2023
 EPS
 39/34/30

■

	2020	2021E	2022E	2023E
	6977	9321	10899	12310
	21	34	17	13
	964	2349	2746	3080
	140	144	17	12
	0.73	1.78	2.08	2.33
ROE(%)	9	18	18	16

Wind

	688396				62.14				2021/10/27			
	2020A	2021E	2022E	2023E		2020A	2021E	2022E	2023E			
ROE	9%	18%	18%	16%	EPS	0.73	1.78	2.08	2.33			
	27%	36%	34%	34%	BVPS	8.02	9.80	11.88	14.21			
	5%	6%	5%	5%								

5

2

2020 5

2018

2019
2020 8
2021

2021

2021

LED PCB

,

300
300
300

300 20%
300 10% 20%
300 -10% 10%
300 10%
